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Nation's
# Restaurant News®
*The Weekly Newspaper of the Food-Service Industry*

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# ANOTHER TOUGH YEAR

## *Economy dashes hopes for industry turnaround*

**By Peter Romeo**

NEW YORK — A softening economy will quash the food-service industry's chances of reversing a three-year sales slowdown during 1989, spurring many operators to look overseas for growth opportunities, according to the National Restaurant Association.

The new year will be particularly taxing for full-service restaurants, ice-cream outlets, and most types of not-for-profit feeding facilities, the association predicted in its 1989 Foodservice Industry Forecast.

Commercial places face the prospect of a 3.2-percent spurt in food costs, a 4-percent jump in payroll expenses, and mounting consumer demand for value that will hold menu price increases to

*(See **SALES**, page 66)*

**Outlook '89**
**NRA forecast details — F7**
**The voices of the industry — F10**
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**Focus follows page 22**

## *NRA plans new tactics to battle key legislation*

**By Peter Romeo**

NEW YORK — By throwing support behind selected labor-oriented proposals before the industry's usual congressional foes draft theirs, the National Restaurant Association hopes to muffle cries for minimum-wage hikes, expanded health benefits, and expanded leaves for working parents.

"We're going to expand our legislative efforts from being just on the defensive to being on the offensive," said NRA president Jim Peterson at a press conference here.

As part of that switch to a proactive stance, he said, the NRA will "seek repeal of the FICA tax on tips" and "will fight to restore" the 100-percent tax deduction for meals where business is conducted.

*(See **NRA**, page 66)*

NRN Photo

**In the new Rosebud Cafe in Chicago, chef Ramon Aguirre, left, and restaurant owner Alex Dana prepare a pasta dish, which is made in-house daily.**

## *New crop of Chicago trattorias meets hunger for casual dining*

**By Carolyn Walkup**

CHICAGO — Casual Italian restaurants are rapidly filling a niche here for midpriced, non-intimidating, familiar ethnic dining.

At least a dozen such places have opened in the metropolitan area here within the past year, ranging from small storefronts to designer-trendy urban spaces. All share the characteristics of basic Italian scratch cooking, fresh ingredients, and moderate prices.

"We thought there was a void in this market," said David Houle, co-owner with his wife, Dee DeCarlo, of Bella Luna in the West Loop, the most upscale of the new breed.

"Ten years ago in Chicago, there were one or two fancy Italian restaurants and the ones serving red-sauced immigrant food," Houle said. "There needed to be something in between."

*(See **TRATTORIAS**, page 66)*

## Failed deal perils H&H-Riese plan

### *Bojangles' transaction on hold*

**By Rajan Chaudhry**

NEW YORK — The collapse of Horn & Hardart Co.'s deal to sell its troubled Bojangles' chain is the latest wild card dealt in the game between the company and the Riese brothers.

Horn & Hardart's failure to close a deal with Greenville, S.C.-based Carabo, the largest Bojangles' franchisee, comes at a critical point in its dealings with Automatic Partners, the investment group led by Irving and Murray Riese, New York restaurateurs and developers.

The Riese group, which

*(See **BOJANGLES'**, page 4)*

**FOOD WATCH**

### *The inaugural luncheon*

WASHINGTON — When George Bush is inaugurated as the 41st president of the United States on Jan. 20, he will be served an Inaugural Day lunch similar to the one requested by the 16th president, Abraham Lincoln.

The Willard hotel will incorporate into its menu the dishes Lincoln asked for in 1861: mock turtle soup, deviled crab, Maryland crab, baked shad with roe soufflé, corned beef and cabbage, and blackberry pie.

Two other dishes that day will be tributes to the Jeffersonian White House: asparagus with Virginia boiled dressing, and blanc mange — almond flour with milk and eggs covered with Virginia Bourbon and apricot sauce.

"We expect 300 guests in our ballroom for that lunch, including the new president," said Dennis Jaricot, executive chef of the Willard hotel, which reopened in August 1986 after renovations.

**— Ken Frydman**

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Vol. 23, No.1 Jan. 2, 1989

# NEWS DIGEST

## NYSRA scrambles to defeat pesticide posting rules

ALBANY — The New York State Restaurant Association was scrambling during the last weeks of 1988 to scotch a new regulation requiring restaurants and hotels to alert patrons when the places are being fumigated with pesticides.

The requirement, which was scheduled to take effect Jan. 1, mandates that warning signs be posted 48 hours before the extermination efforts actually begin.

The NYSRA and other trade groups have challenged the measure in court. They warn that the regulation was the brainchild of national consumer-advocacy groups that intend to crusade for their cause in other states.

## Louisiana nabs restaurants for illegal redfish purchases

NEW ORLEANS — The State Wildlife and Fisheries department said undercover game wardens have nabbed employees of several prominent restaurants here for buying and serving illegally caught redfish and speckled trout.

Posing as fisherman, the agents offered to sell the fishes to restaurants at a time when harvesting of redfish and speckled trout in New Orleans is expressly prohibited. The offer was accepted by employees of such Big Easy establishments as Commander's Palace, Cafe Vieux Carre, and Sportsman's Paradise, the Fisheries department said.

The seafood bans were enacted by Louisiana last year to stem depletion of the state's once-plentiful supply of redfish and speckled trout. But many Cajun restaurants have kept redfish on their menus by buying the fish from Mexico.

## Former '21' staffers win age-discrimination suit

NEW YORK — Fifty former "21" Club staffers have won a $1.2 million age-discrimination suit against the restaurant's owners.

The waiters and bartenders, whose ages range from 55 to 60, filed the suit following the landmark's four-month, $10 million renovation in 1987. The group alleged that Marshall Cogan, who is the principal owner of "21," had promised to rehire the plaintiffs after the upgrade but gave their jobs to younger people instead.

Ten members of the group also won their jobs back.

## London's Peter Langan dies from fire injuries

LONDON — Flamboyant London restaurateur Peter Langan, whose celebrity-studded Langan's Brasserie spawned a Los Angeles branch last year, died here last month as a result of injuries sustained in a fire at his home in October.

Langan, who was 47, never regained consciousness after he was burned in the fire, which police said he might have started intentionally after a domestic dispute with his wife, Susan. News reports said that she broke her ankle when she jumped from a balcony after the blaze erupted.

Irish-born Langan, who created several restaurant concepts, was best known for Langan's Brasserie, which he co-founded with actor Michael Caine and chef Richard Shepard in 1976.

## Jerry's sells Jack's back to Jordan Fainberg

BALTIMORE — Jerry's Systems, operator of the Jerry's Sub Shops chain, has agreed to sell its secondary sandwich concept, Jack's Corned Beef of Lombard Street, back to Jordan Fainberg.

Jerry's acquired the 14-unit Jack's system two years ago from Fainberg, who has served since then as Jack's chief operating officer.

Jerry's and Jack's agreed that both chains would fare better if they operated as separate companies instead of sharing resources.

## *Pillsbury agrees to be acquired by Grand Met*

Stripped of its poison-pill shield, Pillsbury Co. has agreed to be acquired by Grand Metropolitan PLC for a sweetened bid of $66 a share, or $5.7 billion.

The deal — which ended Pillsbury's 11-week struggle to remain independent — was struck just hours after a Delaware court rejected the company's shareholder rights plan, a defense designed to make a takeover prohibitively expensive for the acquirer.

Ruling against the measure, Judge William Duffy said the Grand Met offer was reasonable and the British conglomerate did not pose a menace to the company, as Pillsbury had maintained. The poison pill had blocked Grand Met from buying any of the 90 percent of Pillsbury stock tendered.

Grand Met indicated it plans to keep Pillsbury's Burger King chain. The chain's vocal franchise community had been backing Grand Met in opposition to Pillsbury's takeover defense plan to spin off Burger King as a highly leveraged freestanding chain owned by Pillsbury shareholders.

Meanwhile, liquor license laws will likely force Grand Met to sell Pillsbury's Steak & Ale and Bennigan's chains.

Grand Met, which launched a surprise $60-a-share bid for Pillsbury in October, sweetened its offer to $63 a share about one week before the two sides agreed on the higher $66-a-share price. Pillsbury had evaded its suitor for two months before sitting down with Grand Met last month.

## Copeland extends tender offer for Church's

NEW ORLEANS — A. Copeland Enterprises extended its $8-per-share hostile tender offer for Church's Fried Chicken to Jan. 5 so that it can comply with a district court order requiring that it provide additional disclosures in conjunction with its offer.

Meanwhile, an appeals court here has ordered Copeland, owner of Popeyes, to give five days' notice before buying Church's stock.

Copeland said 44 percent of Church's stock had been tendered.

## Buffet and founder form Northwestern joint venture

EDEN PRAIRIE, Minn. — Buffet Inc., operator of the Old Country Buffet smorgasbord chain, said it is entering into a joint venture with president and founder C. Dennis Scott to develop units in Oregon and Washington.

After a new, jointly owned concern is formed for that purpose, Scott will relinquish his posts at Buffet to become chief executive of the new venture.

However, he will remain on Buffet's payroll as director of research and development, assisting the chain in the development of new menu items and operating procedures.

The plan calls for Buffet to own 40 percent of the joint venture. Scott will be the concern's principal owner.

## Levenson decides against LBO of Furr's-Bishop's

LUBBOCK, Texas — Michael Levenson, chairman and chief executive of Furr's-Bishop's Cafeterias L.P., has informed the company's board that he has decided not to launch a takeover of the cafeteria operator.

Meanwhile, the board said it is still weighing the possibility of converting Furr's-Bishop's, a limited partnership, into a corporation.

Shortly after the board initiated its investigation of that move, Levenson announced that he would assess the option of buying Furr's-Bishop's. He spearheaded an attempt to buy the rival Wyatt cafeteria chain in 1988.

# FOCUS | VIEWPOINT

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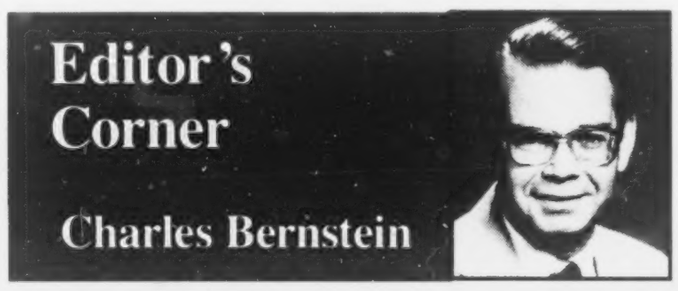
# The newest scapegoats: Consultants

"What is a consultant?"

"A person who borrows your watch to tell time, then charges you dearly for the information."

This bad joke, which has been making the rounds in offices around the country, throws the spotlight on a new industry that has arisen in the last several years: food-service consulting.




To some, a food-service consultant symbolizes a person who is between jobs, just plain out of work, trying something new or making a lot of money by giving advice.

Yet the food-service consulting business has grown because of the increasing complexity of the industry. Experts can help in numerous ways. Menus, design, equipment, operations, marketing, real estate, strategic planning, openings, and closings are among their functions. Saving or renovating a business is often part of the challenge.

More than a few operators take the position that they don't want to deal with consultants, that "nobody knows as much as we do about our own business."

But it may well be advantageous for the operator to use an objective outsider, one who can offer expertise in a specific area.

The first known restaurant consultants were Joseph Baum and George Lang in the early '70s. Some New Yorkers maintain these two and their expanded companies are still the only true food-service consultants who can provide a full range of advice and help, but certainly not at bargain-basement prices.

But literally thousands of consultants with varying degrees of experience and ability have sprung up throughout the nation. Some are quite professional, and others are not. Some have pride in their work and want to give the best to the operator. Others are in the restaurant consulting business for the money only; they could easily be consultants in any business.

It would not surprise us to find that today more food-service executives are employed as consultants than are actually with chains. This is a sign that the food consultant business has reached a point of saturation — even beyond that of the restaurant industry.

This "anyone can be a consultant approach" has unfortunate effects. The bad experiences operators have sustained with the less capable consultants have tainted the reputations of the numerous capable consultants who can really help restaurants.

In a San Francisco talk last August to the Foodservice Consultants Society International, Max's Restaurants president Dennis Berkowitz urged entrepreneurs to "do it yourselves if you want to succeed and don't rely on consultants." He berated "those consultants who tell you about all the elaborate engineering systems and elegant designs you need."

We happen to agree with Berkowitz, who was once a consultant himself and who was not referring to the professional members of the Foodservice Consultants Society in his remarks.

All too many consultants talk restaurateurs into expensive, elaborate designs when a simple decor will suffice — as long as the food and service are superior. But restaurateurs can only blame themselves for this as long as they are lured by the glitz.

As New York's Clark Wolf said in Nation's Restaurant News' recent focus study on consultants, "I'm like a partner to the owner, but at least I can sleep at night." Consultants indeed can walk away from the problems over which restaurateurs tear out their hair.

Consultants are "temporary help," said Los Angeles' Denise Minchella. "Restaurateurs use us only when they need us. We get no salary, no benefits."

We would emphasize the assertion of John Gruner of Grand Rapids, Mich., describing a consultant's job as "pulling together the dream and expectation of the client, to make that happen."

The consultant business is a maligned one, always a convenient scapegoat for anything that ails restaurants. But the ultimate responsibility lies with the operator, and a capable consultant can stretch an operator's performance to maximum achievement.

## *LETTERS*

### *Food-service employees deserve better treatment*

Editor, NRN:

Your Nov. 14 has two articles that I believe deserve a closer look by everyone who reads your journal. Both are Focus Viewpoint articles and in some ways appear to be diametrically opposed to each other.

The first, a letter from R.A. Palfreeman, outlined in some detail his opinion of the current state of affairs in the treatment of food-service employees. The points he makes are well seasoned with experience, the perspective gained from a career in the food industry.

I share his views about the general treatment of food-service workers. Having experienced the "profit at any cost" style of employee relations, I also have chosen to leave the industry. Unlike Palfreeman, I worked for a major quick-service chain, one that many believe has an outstanding human resources approach to recruitment and retention of high-quality employees. Sad to say, most of the programs are not implemented.

As Palfreeman pointed out, things haven't changed much over the years. The average quick-service manager is an incredibly overworked individual, constantly pressed to provide operating "efficiencies" regardless of staffing shortages or unrealistic sales budgets. As a multi-unit supervisor, I had to attempt to convince my subordinates that "quality of life" was possible, even though I asked them to to work 60 hours a week.

I finally tired of the hypocrisy. Because of that, I was no longer a "team player," and to my great relief I was terminated.

As every election year rolled around, staff employees of my former company were solicited by mail to "support those candidates that are probusiness." Probusiness apparently meant those candidates that did not support raising the minimum wage and who advocated less restrictive labor and taxation laws.

The turnover rates in all classes of food industry employees is sky rocketing, and yet the industry apparently is still intoxicated by the idea that employees will always be there, ready to be used and abused and underpaid.

The second article of note was one written by Stanley R. Acker, entitled "Enlightened managers can beat labor crisis."

I was particularly interested in the catch phrase "cost effective ways of reducing the rate of voluntary termination." The entire article, though well written, is a prime example of how the industry is responding to the labor crisis: Take a relatively simple problem, artificially complicate it, then take rigorous and expensive steps to correct the problem we have created.

The answer, of course, is too simple for highly educated and paid executives to accept: treat your employees as you treat your guests. No secret there, no exhaustive report prepared by a consultant-augmented blue ribbon human resources panel. Just the obvious truth.

Your guests expect a fair portion for a fair price; employees expect a fair wage for a fair amount of work. Your guests expect to be treated with respect, so do your employees. Your guests return to experience the good food, atmosphere, and hospitable treatment. Why do we find it so difficult to provide a similar experience for our employees?

Acker stated that many managers do not believe that voluntary terminations can be delayed. While that statement may have validity, I can say that for the last several years I have seen managers *at every level of supervision* become very creative in delaying voluntary terminations. Immediate pay raises, premature promotions, promises that can't be kept, a day or two off with pay for the manager ready to "walk" because of the 100-plus hours they put in to cover unstaffed shifts. And now we bemoan the fact that we can't find good employees anymore?

"As ye sow, so shall ye reap."

**— Randy B. Pond**
Olympia, Wash.

### *Spirits industry covered by Hochstein with style*

Editor, NRN:

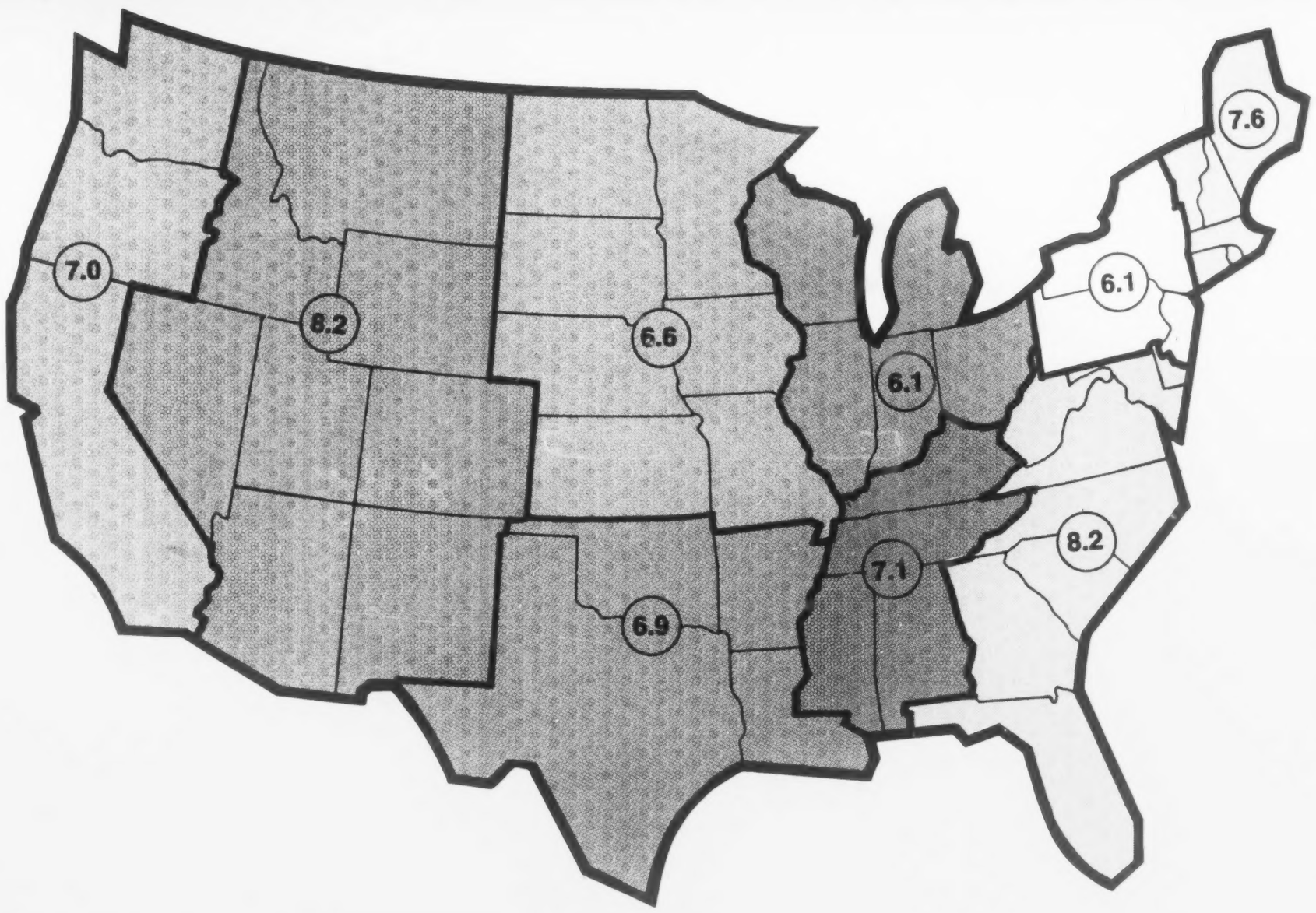
This letter is to tell you how much I enjoy Mort Hochstein's Beer, Wine & Spirits column. The column is upbeat, written with style, and particularly informative.

As one who has an ongoing interest in the alcohol beverage industry, I find Hochstein's column a continuing delight.

**— Marc E. Chafetz**
*president*
Health Communications Inc.
Washington

# FOCUS | OUTLOOK '89

## PERCENT CHANGE IN EATING PLACE SALES, 1988-1989

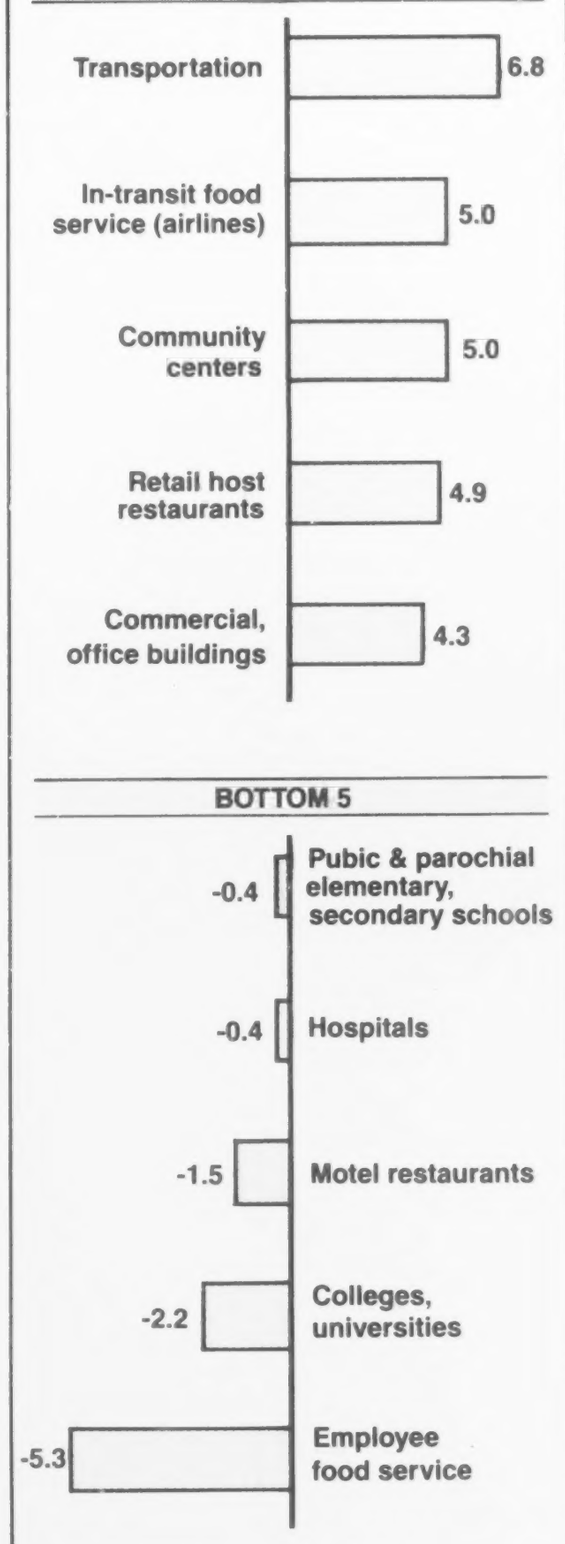



LEGEND

- New England
- Middle Atlantic
- South Atlantic
- East North Central
- East South Central
- West North Central
- West South Central
- Mountain
- Pacific

## WINNERS AND LOSERS

(Ranked by annual % change, real sales)




Source: National Restaurant Association

# NRA: HARD TIMES AHEAD IN '89

*Predicting an uphill battle, the NRA forecasts real sales to rise by a meager 2.2 percent — with institutional and commercial eating places being hit the hardest*

**By Peter Romeo**

The sales slowdown that vexed food-service operators throughout 1988 will worsen this year, holding traffic increases within eating places to the lowest levels since the 1982 recession, according to a National Restaurant Association forecast.

The trade group predicted that total industry sales would rise by 2.2 percent in "real" or inflation-adjusted terms to $227.3 billion, outstripping the projected tally for 1988 by $14.3 billion.

"That's good news," NRA president Jim Peterson remarked at a New York preview of the 1989 NRA Foodservice Industry Forecast.

"The sheer size of this absolute dollar increase," the forecast observed, "presents opportunities for both operators and their suppliers."

"Still, it should be noted that the rate of real growth has moderated," Peterson said.

During 1988, which proved an extremely trying year for most segments of the industry, real sales rose by 2.6 percent, according to the NRA. It pegged the 1987 figure at 2.8 percent.

The trade group attributed the slowdown to a softening of the economy. Disposable income and the Gross National Product — two key indicators of economic health — will both grow at a slower rate in 1989 than they did last year, the association said.

*The NRA attributed the slowdown to a softening of the economy. Disposable income and the Gross National Product — two key indicators of economic health — will both grow at a slower rate in 1989 than they did last year, the association said.*

The prospects are particularly bleak for employer-operated company cafeterias, school lunch programs, and other institutional food-service establishments. The NRA predicted that sales within those places would decline in real terms by 0.1 percent.

However, a 4-percent price hike will soften the blow, boosting nominal sales by 3.9 percent, to $24.2 billion, the association said. It also indicated that the new year would be difficult for commercial eating and drinking places.

Sales within the commercial food-service sector will grow by only 2.4 percent in real terms, compared with the 1988 rate of 2.9 percent and the 1987 figure of 3.2 percent.

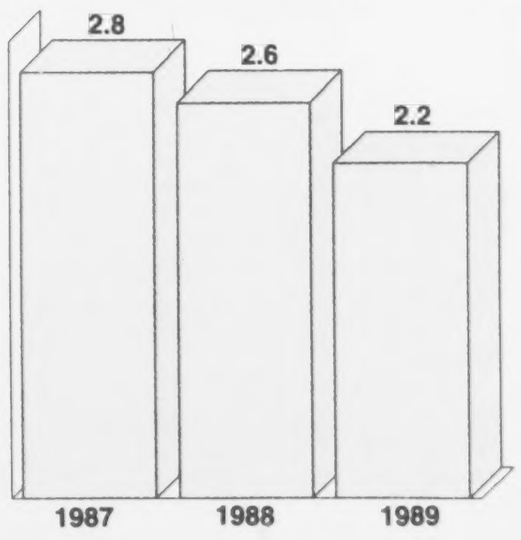
"Eating places," a catchall category that includes most restaurants, will post an inflation-adjusted 2.4 percent rise in sales, to $147.1 billion, the NRA predicted. A 2.4-percent increase in real sales would be the lowest for eating places since 1982, according to NRA data.

The trade group predicted that real sales within all but one type of eating place would grow at a slower rate this year than in '88. The exception is the cafeterias segment, which is projected to boost sales by an inflation-adjusted 2.2 percent, to $4.2 billion.

"The economies of the Southern and *(See **NRA**, page F8)*

## Real Sales Growth

(Total industry)




Source: National Restaurant Association

# FOCUS | OUTLOOK '89

## NRA: REAL SALES TO DIP IN '89

*(Continued from page F7)*

Southwestern states, areas where many of the country's cafeterias are located, are gradually rebounding," Peterson observed.

Full-service restaurants will fare worse than other types of eating places, according to the NRA. It predicted that the segment would nudge real sales upward by only 1.5 percent, to $74.4 billion. The market grew by 1.9 percent in inflation-adjusted terms during 1988, the statistics indicated.

"Competition will be stiff," Peterson commented.

Fast-food places will outpace every other type of eating place in sales growth next year, the NRA said. It forecast real sales growth of 3.6 percent, which compares with the 1988 pace of 4.0 percent.

Peterson, who is also president of the Whataburger quick-service chain, attributed the slower growth to a reduction in the expansion rates of many fast feeders.

"Fast feeders will pay new attention to snack-time meal," he predicted.

The NRA indicated that bars and taverns constitute one of the few industry segments that will grow at a faster pace in real terms next year. The association's numbers call for food-and-beverage sales in drinking establishments to rise by an inflation-adjusted 0.4 percent, to $10.3 billion, compared with the real-growth rate of 0.2 percent logged in 1988.

The NRA predicted that the coming year will be a strong one for contract feeders, with sales likely to rise in real terms by 3.6 percent, to $12.8 million.

"The client base is growing," Peterson explained. "Institutions are abandoning their own food service," creating new opportunities for contractors.

Airline caterers will post a larger real-sales gain than will any other segment, buoying their inflation-adjusted intake by 5 percent, to $1 billion.

*The association predicted that restaurants housed in retail establishments would perform better than most food-and-beverage outlets during 1989. Those specialists will take in $9.6 billion next year, for a 4.9-percent real sales gain, the NRA said.*

"Airline traffic is slated to rise 5 percent in 1989," the NRA noted. "Cuts are not expected in airline food service provided in transit."

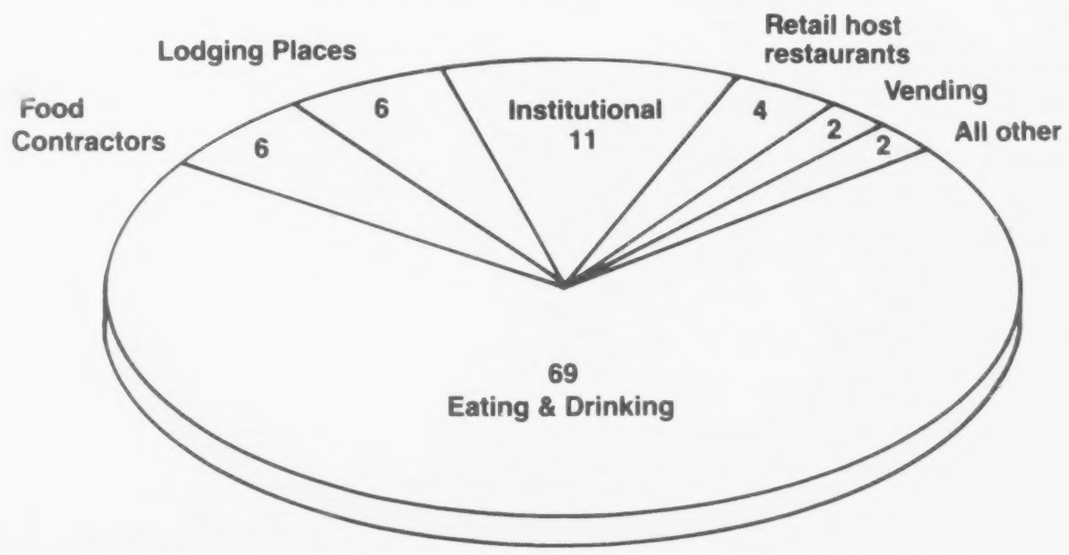
The forecast also noted that higher employment rates will buoy real sales at contractor-operated cafeterias in factories by 4 percent. A surge in white-collar jobs will raise real sales at employee feeding facilities within office buildings by 4.3 percent, the NRA said.

The association predicted that restaurants housed in retail establishments would perform better than most food-and-beverage outlets during 1989. Those specialists will take in $9.6 billion next year, for a 4.9-percent real sales gain, the NRA said.

The statistics were drafted for the NRA by Malcolm M. Knapp Inc., a New York-based research and consulting concern.

### THE INDUSTRY AT A GLANCE

(Segment as % of total industry, 1989)




Source: National Planning Association, Regional Economic Projections Series; National Restaurant Association

**FOOTNOTES:**

1. Data are given only for establishments with payroll.
2. Food and drink sales for nonpayroll establishments totaled $3.6 billion in 1985.
3. Includes drug and proprietary store restaurants, general-merchandise-store restaurants, variety-store restaurants, food-store restaurants, grocery-store restaurants, gasoline-service-station restaurants, and miscellaneous retailers.
4. Includes drive-in movies, bowling lanes, and recreation and sports centers.
5. Includes sales of hot food, sandwiches, pastries, coffee, and other hot beverages.
6. Includes industrial and commercial organizations, and seagoing and inland waterway vessels.
7. Includes voluntary and proprietary hospitals, long-term general, TB, mental hospitals, and sales or commercial equivalent to employees in state and local short-term hospitals and federal hospitals.
8. Sales (commercial equivalent) calculated for nursing homes and homes for the aged only. All others in this grouping make no charge for food served either in cash or in kind.
9. Continental United States only.

### FORECAST: FOOD SERVICE IN 1989
**(By segment)**

| | FOOD & DRINK SALES ($ millions) | GROWTH RATE Nominal (%) | Real (%) |
|---|---|---|---|
| GROUP 1 | | | |
| EATING PLACES | | | |
| Full service | 74.4 | 6.1 | 1.5 |
| Fast food | 65.1 | 8.2 | 3.6 |
| Cafeterias | 4.2 | 6.8 | 2.2 |
| Caterers | 1.7 | 2.8 | 7.2 |
| Ice cream, snacks | 1.8 | 6.5 | 1.9 |
| TOTAL EATING PLACES [1.] | 147.1 | 7.0 | 2.4 |
| Bars, taverns | 10.3 | 5.0 | 0.4 |
| TOTAL EATING & DRINKING PLACES | 157.4 | 6.9 | 2.3 |
| FOOD CONTRACTORS | | | |
| Manufacturing, industrial plants | 3.7 | 8.6 | 4.0 |
| Commercial, office buildings | 1.3 | 8.9 | 4.3 |
| Hospitals, nursing homes | 1.6 | 8.0 | 3.4 |
| Colleges, universities | 2.4 | 8.8 | 3.6 |
| Primary, secondary schools | 1.1 | 6.8 | 2.2 |
| In-transit food service (airlines) | 1.0 | 9.0 | 5.0 |
| Recreation, sports centers | 1.7 | 7.3 | 2.7 |
| TOTAL FOOD CONTRACTORS | 12.8 | 8.3 | 3.6 |
| LODGING PLACES | | | |
| Hotel restaurants | 11.8 | 7.3 | 2.7 |
| Motor hotel restaurants | 0.9 | 4.3 | —0.3 |
| Motel restaurants | 1.3 | 3.1 | —1.5 |
| TOTAL LODGING PLACES | 13.9 | 6.7 | 2.1 |
| Retail host restaurants [3.] | 9.6 | 9.5 | 4.9 |
| Recreation, sports [4.] | 2.4 | 6.1 | 1.5 |
| Mobile caterers | 0.8 | 6.5 | 1.9 |
| Vending, non-store retailers [5.] | 5.0 | 5.9 | 0.8 |
| TOTAL GROUP I | 202.0 | 7.0 | 2.4 |
| GROUP II — Institutional food service | | | |
| Employee food service [6.] | 1.9 | —0.9 | —5.3 |
| Public, parochial, elementary, secondary schools | 3.5 | 4.2 | —0.4 |
| Colleges, universities | 3.5 | 3.0 | —2.2 |
| Transportation | 1.3 | 10.6 | 6.8 |
| Hospitals [7.] | 7.7 | 2.8 | —0.4 |
| Nursing homes, homes for aged, blind, orphans, and the mentally and physically handicapped [8.] | 3.6 | 5.3 | 2.1 |
| Clubs, sporting, recreational camps | 2.0 | 5.9 | 1.4 |
| Community centers | 0.6 | 8.2 | 5.0 |
| TOTAL GROUP II | 24.2 | 3.9 | —0.1 |
| TOTAL GROUPS I & II | 226.2 | 6.7 | 2.2 |
| GROUP III — Military food service [9.] Officers, NCO clubs | 0.7 | 6.1 | 1.5 |
| Foodservice — military exchanges | 0.4 | 6.5 | 1.9 |
| TOTAL GROUP III | 1.1 | 6.2 | 1.6 |
| GRAND TOTAL | 227.3 | 6.7 | 2.2 |

Source: National Restaurant Association